

**1A Paul Harvey Wallace (Estate)****Case No. 08CEPR00294****Atty Donaldson, Larry A. (pro per – former Executor)****Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)****Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013**

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.  The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>CONTINUED FROM 09/08/14</u></b>  <b>As of 10/22/14, nothing further has been filed.</b>  1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.
<b>Cont. from 040714, 050514, 070714, 090814</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
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<b>Letters</b>		
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<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

<b>Reviewed by:</b> JF
<b>Reviewed on:</b> 10/22/14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 1A – Wallace</b>

**1A**

**1B Paul Harvey Wallace (Estate)**

**Atty Donaldson, Larry A. (former Executor)**

**Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)**

**Case No. 08CEPR00294**

**Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00**

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>CONTINUED FROM 09/08/14</u></b>  As of 10/22/14, nothing further has been filed.
<b>Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814</b>	On 07/26/13, <b>LARRY DONALDSON</b> resigned as Executor and the <b>PUBLIC ADMINISTRATOR</b> , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
<b>Aff.Sub.Wit.</b>	<b>Minute order from 12/05/13 set this matter for an Order to Show Cause and states:</b> The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
<b>Verified</b>		
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<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
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<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 10/22/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1B – Wallace</b>

**1B**

**1C Paul Harvey Wallace (Estate)**

**Case No. 08CEPR00294**

**Atty Donaldson, Larry A. (former Executor)**

**Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)**

**Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00**

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>CONTINUED FROM 09/08/14</b></u>  As of 10/22/14 nothing further has been filed.
<b>Cont. from 010214, 013014, 022014, 050514, 070714, 090814</b>	On 07/26/13, <b>LARRY DONALDSON</b> resigned as Executor and the <b>PUBLIC ADMINISTRATOR</b> , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
<b>Aff.Sub.Wit.</b>	<b>Minute order from 12/05/13 set this matter for an Order to Show Cause and states:</b> The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
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<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> JF
		<b>Reviewed on:</b> 10/22/14
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 1C – Wallace</b>

**1C**

1D Paul Harvey Wallace (Estate)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Atty Leonard, Laura (pro per – daughter)

Case No. 08CEPR00294

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

<b>DOD: 06/22/07</b>	<b>LARRY A. DONALDSON</b> , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>CONTINUED FROM 09/09/14</u></b>  <b>Note:</b> Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.  <b>Note:</b> Letters of Administration were issued to the Public Administrator on 08/01/13.  <b>As of 10/22/13, the following remains outstanding:</b> <ol style="list-style-type: none"><li>1. Need <b>Final Inventory &amp; Appraisal</b>.</li><li>2. Need <b>Accounting and/or Petition for Final Distribution</b>.</li></ol>
<b>Cont. from 050514, 070714, 090814</b>	<b>Notice of Status Hearing</b> filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.	
<b>Aff.Sub.Wit.</b>	<b>Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11</b> states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	<b>Inventory &amp; Appraisal, partial no. 1 filed 07/24/13</b> - \$1,619,273.76  <b>Clerk's Certificate of Mailing filed 10/08/13</b> states that a copy of the Minute Order from 10/04/13 was mailed to Larry Donaldson on 10/08/13.  Continued on Page 2	

1D

**Status Report Regarding Filing of Accounting** filed 07/01/14 states: Mr. Donaldson has retained Curtis Rindlisbacher to assist him in the preparation of an accounting that will conform with the requirements of the Probate Code. Mr. Rindlisbacher has been in contact with the accountants who prepared prior accountings and he is working with them to segregate the accounting for the probate estate and the accounting from the trust estate. Mr. Rindlisbacher has spoken with attorney Heather Kruthers regarding the need for additional time to complete the accounting and she has consented to an extension of time to file the accounts with the court. It is believed that the work can be completed in 45 days and therefore requests that the status hearing be continued to on or after 08/21/14.

		<p><b>MARY MCCALL</b>, Mother and Conservator, is Petitioner.</p> <p>Current bond is \$473,149.00.</p> <p>Account period: 6-20-12 through 6-30-14</p> <p>Accounting: \$727,600.26 Beginning POH: \$663,437.54 Ending POH: \$685,701.58 (\$312,401.58 cash plus annuity)</p> <p>Conservator: Waived</p> <p>Attorney: \$2,000.00 (per Local Rule)</p> <p><b>Petitioner states</b> the Conservatee enjoys visiting her sister, niece and nephew in San Diego, and has flown there 10 times in the past two years. The Conservator flies with her and pays her own air fare. These visits are beneficial to the Conservatee, as she only has one sibling and visiting her family is in her best interest.</p> <p><b>Petitioner prays for an Order</b> approving, allowing and settling the 6<sup>th</sup> Account and authorizing attorney fees.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> The Court will set a status hearing for the filing of the 7<sup>th</sup> Account on Thursday, 10-20-16.</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
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	Objections			
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✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 10-20-14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2 - McCall</b></p>				

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for  
Failure to File a First Account or Petition for Final Distribution**

	<b>ARTHUR K. O'BRIEN, JR.</b> , son, appointed executor with full IAEA authority without bond on 07/14/2006.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Letters issued on 07/19/2006.	<b>3B is the Order to Show Cause re: Failure to Appear; Failure to Timely Proceed with this Matter; Imposition of Sanctions in the Amount of \$500.00.</b>
	Inventory and Appraisal was due 12/2006.	
<b>Cont. from 022814, 050914, 062314</b>	First Account or Petition for Final Distribution was due 09/2007.	<b>Minute Order of 06/23/2014:</b> The Court notes that Ruth Ratzlaff is not present. The Court on its own motion removes Arthur O'Brien, Jr. as the executor and appoints the Public Administrator as the personal representative. The Court set the matter for an Order to Show Cause on 10/23/2014 regarding failure to appear; failure to timely proceed with this matter, and imposition of sanctions in the amount of \$500. Ruth Ratzlaff is ordered to be personally present on 10/23/2014.
<b>Aff.Sub.Wit.</b>	Notice of Status Hearing was mailed to Attorney Ruth E. Ratzlaff and Arthur K. O'Brien, Jr. on 11/22/2013.	
<b>Verified</b>	Public Administrator was appointed on 06/23/2014.	<b>Minute Order of 05/09/2014:</b> No appearances. The Court notes that this is the second continuance without an appearance by Ruth Ratzlaff. Ruth Ratzlaff is ordered to be personally present on 06/23/2014. The Court will consider issuing an Order to Show Cause if there is no appearance by counsel at the next hearing.
<b>Inventory</b>	Final Inventory and Appraisal was filed 09/19/2014 showing an estate valued at \$87,500.00.	
<b>PTC</b>	<b>Status Report Regarding Failure to File Final Account filed by the Public Administrator on 10/16/2014</b> states the sole asset of the estate is 50% interest in the real property located in Fresno County. As part of the divorce settlement between Liane O'Brien and the decedent, they became tenants in common of the property. Liane O'Brien died May 4, 2006. Arthur K. O'Brien, Jr. petitioned and was appointed administrator of her estate on 10/24/2006 (Case #06CEPR00774). However, he never paid the bond, Letters were never issued, and nothing further was done in the estate.	<b>Copy of Minute Order mailed to Attorney Ruth E. Ratzlaff on 05/16/2014.</b>
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		1. Need First Account or Petition for Final Distribution.
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		<b>Reviewed by:</b> LV
<b>Sp.Ntc.</b>		<b>Reviewed on:</b> 06/19/2014
<b>Pers.Serv.</b>		<b>Updates:</b>
<b>Conf. Screen</b>		<b>Recommendation:</b>
<b>Letters</b>		<b>File 3A – O'Brien</b>
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

**Please see additional page**

**Status Report continued from previous page:** The Public Guardian had Arthur O'Brien's 50% interest in the real property appraised by Steven Diebert and has found a potential buyer for the property. However, the property needs to be sold in conjunction with the Liane O'Brien estate. Therefore, the Public Administrator requested that a status hearing be set for Liane O'Brien's estate, and it was set for 10/15/2014. At that hearing Arthur K. O'Brien, Jr. resigned as administrator.

The Public Guardian needs to get the 50% interest of the real property owned the Liane O'Brien estate appraised by Rick Smith. In order to allow time to file the appraisal, complete the sale of the property, and to prepare the documents for the final account, it is respectfully requested that the next status hearing for this matter be set no sooner than 90 days from the date of this hearing.



**3B Arthur K O'Brien (Estate)**  
**Atty Ratzlaff, Ruth E (for Arthur K. O'Brien, Jr. – Executor)**  
**Atty Kruthers, Heather (for Public Administrator)**

**Case No. 05CEPR01224**

**Order to Show Cause Re: Failure to Appear; Failure to Timely Proceed with this Matter; Imposition of Sanctions in the Amount of \$500.00.**

		<p><b>ARTHUR K. O'BRIEN, JR.,</b> son, appointed executor with full IAEA authority without bond on 07/14/2006.</p> <p><b>Minute Order of 06/23/2014 set this Order to Show Cause re: Failure to Appear; Failure to Timely Proceed with this Matter; Imposition of Sanctions in the Amount of \$500.00.</b></p> <p><b>Notice of Order to Show Cause was mailed to Attorney Ruth E. Ratzlaff on 06/27/2014.</b></p> <p><b>Minute Order of 06/23/2014:</b> The Court notes that Ruth Ratzlaff is not present. The Court on its own motion removes Arthur O'Brien, Jr. as the executor and appoints the Public Administrator as the personal representative. The Court set the matter for an Order to Show Cause on 10/23/2014 regarding failure to appear; failure to timely proceed with this matter, and imposition of sanctions in the amount of \$500. Ruth Ratzlaff is ordered to be personally present on 10/23/2014.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need payment in the amount of \$500.00 for sanctions imposed on Attorney Ruth E. Ratzlaff.</p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
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<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 10/22/2014</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3B – O'Brien</b></p>	

**3B**

<b>DOD: 2-16-06</b>			<b>JACQUELINE DAWN SHELTON and ANNA MONTZ SHELTON</b> , Co-Administrators with Full IAEA without bond, are Petitioners.  <b>Account period:</b> <b>2-16-06 through 9-4-14</b> Accounting: \$230,220.93 Beginning POH: \$230,049.53 Ending POH: \$ 47,836.10 (cash)  Co-Administrators (Statutory): Waived  Attorney (Statutory): \$4,601.48  Costs: \$562.00 (Recording fees, filing fees, certified Letters)  Closing: \$1,000.00  Petitioners state the six (6) Creditor's Claims filed in the estate were rejected on 6-4-14. Petitioners have no knowledge of suit having been filed. The time to file suit has expired.  Distribution pursuant to intestate succession is to:  Harold George Shelton, Jr.: \$8,334.52 Anna Montez Shelton: \$8,334.52 Jerry Lee Shelton: \$8,334.52 Jacqueline Dawn Shelton: \$8,334.52 David Lynn Shelton: \$8,334.52	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. The main asset of this estate was the decedent's home, which was valued at \$230,000.00 at her date of death in 2006. The estate was not closed timely, and the house was not sold until 2014, by which time its value was greatly diminished. The loss on the sale was \$110,000.00. The delay appears to have been detrimental to the estate and heirs.</b>  <b>In addition to that loss, this account does not indicate that any rent was ever received, or that any expenses were ever incurred with regard to the house. Was the house vacant all these years? If the estate received rent, it is not accounted for here. This also appears to have contributed to the detriment to the estate and heirs. If the estate did not receive rent, why not? The Court may require additional information or may require waivers from the five heirs.</b>  <b>2. The attorney requests the entire amount of the statutory compensation. However, it is noted that this estate has been open for over eight years. Mr. Teixeira has been the attorney of record since 2008 (six years). Pursuant to Probate Code §12205, the Court may reduce compensation if it finds that the time take for administration exceeds the time required by this chapter (1 year), the time taken was within the control of the personal representative or attorney, and the delay was not in the best interest of the estate or interested persons. See #1 above.</b>
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
✓	<b>Inventory</b>			
✓	<b>PTC</b>			
✓	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	w/o		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
✓	<b>Letters</b>	9-20-06		
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
✓	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
N/A	<b>FTB Notice</b>			
			<b>Reviewed by:</b> skc <b>Reviewed on:</b> 10-22-14 <b>Updates:</b> <b>Recommendation:</b> <b>File 4 – Shelton</b>	

## Status Hearing Re: Filing of the Inventory and Appraisal; Filing of First Account and/or Petition for Final Distribution

<b>DOD: 6-9-11</b>	<b>JANETTE COURTNEY</b> , was appointed Executor with Full IAEA without bond and Letters issued on 9-15-11.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Inventory and Appraisal Partial No. 1 filed 2-13-13 included commercial real property valued at \$250,000.00, which was sold pursuant to Order Confirming Sale of Real Property.	<b>Minute Order 4-8-13:</b> Mr. Keeler and Mr. Ivy are appearing via conference call. Mr. Ivy is directed to file a fully executed agreement with the court. Matter is set for Status Hearing on 5/24/13 regarding the settlement agreement and the dismissal. If the agreement and dismissal are filed by 5/24/13, no appearance will be necessary. The status hearing regarding the inventory and appraisal is continued to 6/28/13 for appearance by Mr. Neilson only. Set on 5/24/13 @ 9:00 a.m. Dept. 303 for: Status Hearing Re: Settlement Agreement and Dismissal
<b>Cont. from 040813, 062813, 072613, 100413, 011714, 032114, 042514, 060614, 072114, 091814</b>	At hearing on 2-25-13, the Court set status hearing for 4-8-13 for the filing of the Final Inventory and Appraisal, filing of the first account, and/or petition for final distribution.	
<b>Aff.Sub.Wit.</b>	The status hearing for filing of the final Inventory and Appraisal has been continued to 6-28-13 and now 7-26-13.	<b>Note:</b> Full and Complete Settlement Agreement and Mutual Release of All Claims filed 4-11-13, and dismissal of petition filed by Dennis L. Thomas on 12-19-11 was entered on 5-1-13.
<b>Verified</b>		
<b>Inventory</b>	<b>Status Report filed 7-19-13 states:</b>	<b>Minute Order 9-18-14:</b> No appearances. Mr. Bruce A. Neilson is ordered to personally appear. Continued to 10-23-14 at 9:00 in Dept. 303.
<b>PTC</b>	<ul style="list-style-type: none"> <li>Petitioner has performed all required duties as personal representative</li> <li>All known debts have been paid except for mortgage on real property which has a market value below the mortgage amount</li> <li>All administration costs to date except for compensation to the personal representative and attorney have been paid</li> <li>The estate is solvent</li> <li>A creditor's claim filed by Steven Drummond has been rejected</li> <li>There is currently no pending litigation involving the estate; however, there is a potential claim against beneficiaries for recovery of a vehicle and reimbursement for sales tax paid</li> <li>The status of a business being operated by a beneficiary, and the estate's current interest therein, has yet to be determined/negotiated.</li> <li>It is estimated that an additional three (3) months will be needed to complete administration of the estate, unless litigation is needed to recover the vehicle.</li> <li><b>Petitioner requests authority to continue administration until 10-1-13.</b></li> </ul>	
<b>Not.Cred.</b>		<b>Note: This is the 11<sup>th</sup> status hearing on this matter. As of 10-20-14, nothing further has been filed.</b>
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		<b>1. Need Final I&amp;A.</b>
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		<b>2. Need First Account or Petition for Final Distribution pursuant to Probate Code §12200.</b>
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		<b>Reviewed by:</b> skc
<b>Letters</b>		
<b>Duties/Supp</b>		<b>Reviewed on:</b> 10-20-14
<b>Objections</b>		
<b>Video Receipt</b>		<b>Updates:</b>
<b>CI Report</b>		
<b>9202</b>		<b>Recommendation:</b>
<b>Order</b>	<b>Status Report filed 10/03/13 states:</b> Since the prior status hearing the executor has been able to locate the Chevrolet Suburban, however it is damaged and towing and storage may be equal or more than the value. A compromise with the storage facility is being negotiated. Additionally, no paperwork has been located regarding the horse that a beneficiary claims belonged to the decedent and for which he is making a claim for care and feeding. The estate has rejected the claim. As to the real property in Mariposa, CA, it was thought that the bank was foreclosing on the property, but they have not. Time is requested to appraise and inventory this property and the Suburban as well as resolve the disposition of the horse.	
<b>Aff. Posting</b>		<b>File 5 - Drummond</b>
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

Atty Armo, Lance E., sole practitioner (for Petitioner Roger Day, Executor)

## (1) Petition for Final Distribution on Waiver of Account and (2) for Allowance of Compensation for Ordinary Services

<b>DOD: 8/2/2006</b>	<b>ROGER DAY</b> , son and Executor, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Accounting is waived.		
<b>Cont. from</b>	I & A	—	<p>1. <i>Final Inventory and Appraisal</i> filed on 2/26/2013 is incomplete at Item 5 re: property tax certificate, as required by Probate Code § 8800(d). Need statement regarding Property Tax Certificate. (Revenue and Tax Code § 480.)</p> <p>2. Paragraph 12 of the <i>Petition</i> states the real property residence included on the <i>Final Inventory and Appraisal</i> filed 2/26/2013 valued at <b>\$190,000.00</b> was sold during the proceedings by <i>Notice of Proposed Action</i>. <i>Notice of Proposed Action</i> filed 8/14/2014 states the real property was sold for <b>\$87,000.00</b>. Statutory fee base does not include the <b>\$103,000.00</b> loss on the sale of Decedent's real property pursuant to Probate Code § 10810(b). Correct statutory fee calculates as <b>\$3,480.00</b>, resulting in a difference of <b>\$3,220.00</b> requested in excess of the allowable statutory fee amount. Need revised proposed order containing the correct statutory fee and distribution amounts. —Revised Order submitted 10/21/2014.</p>
<input type="checkbox"/> Aff.Sub.Wit.	POH	—	
<input checked="" type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory	Executor	—	
<input type="checkbox"/> PTC			
<input checked="" type="checkbox"/> Not.Cred.	Attorney	—	
<input checked="" type="checkbox"/> Notice of Hrg	(statutory)		
<input checked="" type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters	022513		
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input checked="" type="checkbox"/> FTB Notice			

Reviewed by: LEG

Reviewed on: 10/21/14

Updates: 10/22/14

Recommendation:

File 6 – Day

**Probate Status Hearing RE: Filing of Increased Bond**

<b>DOD: 3/29/13</b>	<p><b>MARK REIFF</b> was appointed executor with full IAEA and bond set at \$120,000.00 on 9/13/13.</p> <p>Bond filed on 7/8/13.</p> <p>Letters issued on 9/13/13.</p> <p>On 9/5/14 the Court signed an ex parte order increasing the bond to \$2,100,000.00.</p> <p>This status hearing was set for the filing of the increased bond.</p> <p><b>Note:</b> With the current bond of \$120,000.00 the increased bond will be \$1,980,000.00.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>OFF CALENDAR.</b> Increased bond filed on 10/15/14.</p>
<b>Cont. from 100914</b>		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 10/22/14</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 7 - Carlson</b></p>

Atty Renge, Lawson K. (for Betty Phillips and Rose Lee Little – sisters/co-executors)  
 Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

<b>DOD: 11/26/12</b>	<b>BETTY PHILLIPS and ROSE LEE LITTLE,</b> sisters, were appointed Co-Executors with full IAEA and without bond on 06/11/13. Letters Testamentary were issued on 06/11/13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Account/Report on Waiver of Account and Petition for Final Distribution <u>and/or</u> current written status report.
<b>Cont. from 080814</b>		
<b>Aff.Sub.Wit.</b>	Inventory & Appraisal, partial no. 1, filed 02/13/14 - \$615,000.00	<b>Reviewed by:</b> JF <b>Reviewed on:</b> 10/22/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 8 – Kiramidjian</b>
<b>Verified</b>	Inventory & Appraisal, final, filed 07/17/14 - \$63,096.95	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report filed 10/17/14 states:</b> Since the last status report, a petition for preliminary distribution was granted order the sums of \$70,000.00 each to Betty Phillips and Rose Lee Little and the transfer of real property located at 945 S. Clovis Ave., Unit J, Fresno to Kimberly Dee McLay. A civil action for breach of contract (14CECG02269) was served on Karlie Steinhauer, a beneficiary of the estate, and Jamie Rust, for collection of over \$50,000.00 due and owing to the estate. Karlie Steinhauer has made contact with the attorney and indicated that she is willing to commence payments on the contractual sum. It is believed that an agreement can be made with Karlie Steinhauer to settle the debts without a trial. Accordingly, a continuance is requested.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

Atty Barron, Richard B., sole practitioner of Visalia (for Petitioner Perine & Dicken)

Petition for Approval of Trustee's First Account Current, for Approval of Trustee's Fees, for Authorization to Compensate Counsel for the Trustee and for Authorization to Invest in Mutual Funds

<b>Age: 4 ½ years</b>		<b>PERINE &amp; DICKEN</b> , Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>					
		<b>Account period: 7/2/2013 – 6/30/2014</b>	<p><b>Note:</b> Court will set a status hearing as follows:</p> <ul style="list-style-type: none"> <li><b>Tuesday, December 2, 2014 at 9:00 a.m. in Dept. 303</b> for filing proof of reduced bond; and</li> <li><b>Tuesday, August 23, 2016 at 9:00 a.m. in Dept. 303</b> for filing the 2nd account.</li> </ul> <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.</p>					
		Accounting - <b>\$573,507.22</b>						
		Beginning POH - <b>\$561,694.07</b>						
		Ending POH - <b>\$555,101.64</b>						
		(\$60,882.35 is cash)						
<b>Cont. from</b>								
	<b>Aff.Sub.Wit.</b>							
✓	<b>Verified</b>	Trustee - <b>\$7,600.00 (paid)</b>						
✓	<b>Inventory</b>	(itemized at Exhibit D; for 60.80 hours @ \$125.00 per hour; Order Establishing SNT filed 7/22/2013 authorizes Trustee fees of up to maximum of \$1,500.00 per month subject to Court approval;)						
	<b>PTC</b>							
	<b>Not.Cred.</b>							
✓	<b>Notice of Hrg</b>	Attorney - <b>\$2,548.50</b>						
✓	<b>Aff.Mail</b>	(itemized at Exhibit E; for 13.80 hours @ \$235.00 and \$250.00 attorney rates per hour and \$90.00 paralegal and bookkeeper rates per hour;)						
	<b>Aff.Pub.</b>							
	<b>Sp.Ntc.</b>							
	<b>Pers.Serv.</b>	Bond - <b>\$650,232.16</b>						
	<b>Conf. Screen</b>	(Petitioner requests reduced bond of <b>\$646,000.00</b> ;) )						
	<b>Letters</b>	<b>Petitioner requests</b> authorization to invest trust funds in mutual funds invested in publicly traded securities, bonds, and money market fund, and in any investments allowed under Probate Code § 2574. (Section 6.8 of the Special Needs Trust allows Trustee to seek Court authorization to make investments other than US Government obligations maturing not later than 5 years from the date of investment.)						
	<b>Duties/S</b>							
	<b>Objections</b>							
	<b>Video Receipt</b>							
	<b>CI Report</b>							
✓	<b>2620</b>	<b>Petitioner prays for an Order:</b>						
✓	<b>Order</b>	1. Approving, allowing and settling the First Account and Report of the Trustee;						
	<b>Aff. Posting</b>	2. Accepting resignation of Christopher Kennedy as Co-Trustee and discharging and exonerating him from any further liability or responsibility of the SNT;						
	<b>Status Rpt</b>	3. Approving as just and reasonable the Trustees' fees charged to the SNT from 7/1/2013 to 6/30/2014;						
	<b>UCCJEA</b>	4. Authorizing payment of the Attorney fees;						
	<b>Citation</b>	5. Authorizing bond be reduced to <b>\$646,000.00</b> ;						
	<b>FTB Notice</b>	6. Authorizing investment in publicly traded securities, bonds, and money market fund, and in any investments allowed under Probate Code § 2574.						
			<table border="1"> <tr> <td><b>Reviewed by:</b> LEG</td> </tr> <tr> <td><b>Reviewed on:</b> 10/21/14</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File 9 – Davis-Maynard</b></td> </tr> </table>	<b>Reviewed by:</b> LEG	<b>Reviewed on:</b> 10/21/14	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 9 – Davis-Maynard</b>
<b>Reviewed by:</b> LEG								
<b>Reviewed on:</b> 10/21/14								
<b>Updates:</b>								
<b>Recommendation:</b>								
<b>File 9 – Davis-Maynard</b>								

Atty Teixeira, J. Stanley, sole practitioner (for Petitioner Jeffrey Snyder, Executor)

## (1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory Commissions

<b>DOD: 6/4/2013</b>		<b>JEFFREY SNYDER</b> , friend and Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived.	
		I & A — <b>\$267,616.00</b>	1. Decedent's Will makes reference to Promissory Notes executed by <b>DARRYL ZUBER</b> and to any balances owing to Decedent under the referenced Promissory Notes. Need clarification regarding whether the name <b>DARRYL ZUBER</b> mentioned in Decedent's Will is merely a typographical error or whether there now exists or had previously existed Promissory Notes at the time of the Will execution on 5/19/1999 that were satisfied in full or otherwise addressed. If <b>DARRYL ZUBER</b> is a separate and distinct individual mentioned in Decedent's Will, he should have received notice at the outset of these proceedings, or at least, the previous and instant pleadings should have explained the disposition of the Promissory Notes and the mention of this individual in the Decedent's Will.  2. Proposed order at line 17 finds that a Deed of Trust executed by <b>DARIN ZUBER</b> in favor of <b>JOHN BACHMAN</b> is to be distributed to <b>HEIDI ZUBER</b> ; however, it appears the finding should instead state a Deed of Trust executed by <b>HEIDI ZUBER</b> in favor of <b>JOHN BACHMAN</b> is to be distributed to <b>HEIDI ZUBER</b> .
		POH — <b>\$274,343.60</b> (\$17,477.60 is cash)	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	Executor — <b>\$8,352.32</b> (statutory)	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Attorney — <b>\$8,352.32</b> (statutory)	
<input checked="" type="checkbox"/>	<b>PTC</b>	Closing — <b>\$772.96</b>	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>Petitioner states</b> that following Notice of Proposed Action filed 8/4/2014 Petitioner borrowed from beneficiary <b>JOHN BACHMAN \$20,000.00</b> to meet cash obligations of the estate, since the beneficiaries preferred not to liquidate certain assets held by the estate; the obligation is being apportioned and equalized in the final distribution.	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/O	
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>	072513	
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
<b>Distribution pursuant to Decedent's Will is to:</b> <ul style="list-style-type: none"> <li><b>JOHN BACHMAN</b> – life estate in real property; and an undivided 1/3 remainder interest in real property;</li> <li><b>DARIN ZUBER</b> – an undivided 1/3 remainder interest in real property, subject to a Deed of Trust executed by <b>DARIN ZUBER</b> in favor of <b>JOHN BACHMAN</b> in the amount of <b>\$6,666.66</b> at no interest; and an undivided 1/3 interest in furniture, furnishings, and personal belongings and effects;</li> <li><b>HEIDI ZUBER</b> – diamond ring; an undivided 1/3 remainder interest in real property, subject to a Deed of Trust executed by <b>HEIDI ZUBER</b> in favor of <b>JOHN BACHMAN</b> in the amount of <b>\$6,666.66</b> at no interest; and an undivided 1/3 interest in furniture, furnishings, and personal belongings and effects.</li> </ul>			<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 10/22/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 10 – Bachman</b>



Atty Fanucchi, Edward L. (for Administrator Isabel Diaz-Casillas)

(1) First and Final Account and Report of Personal Representative, Petition for Settlement (2) for Allowance of Attorneys' Fees for Ordinary Services, (3) Waiver of Commission, Costs, Reserve and (4) for Final Distribution to Verbal Testamentary Trust

<b>DOD: 1-17-13</b>		<b>ISABEL DIAZ-CASILLAS</b> , Sister and Administrator with Full IAEA without bond, is Petitioner.  <b>Account period: 1-18-13 through 6-30-14</b> Accounting: \$155,082.17 Beginning POH: \$155,082.17 Ending POH: \$119,894.35 (cash)	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b>  <b>Amended petition filed 10-16-14 is set for hearing on 12-3-14</b>  <b>Note:</b> <i>Nunc Pro Tunc Consent of Designated Beneficiary to Probate of Assets and Distribution to Trust for Children of Decedent</i> was filed 10/6/2014 by the following persons: <ul style="list-style-type: none"> <li>Isabel Diaz-Casillas, sister of Decedent;</li> <li>Dina Diaz, sister of Decedent.</li> </ul> <b><u>SEE ADDITIONAL PAGES</u></b>	
<b>Cont. from 082814, 100914</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			X
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			W
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>	<b>Petitioner states</b> that pursuant to the wishes of the decedent prior to her death, it was her intention that the following assets be held in trust by Petitioner for the benefit of her two children and that funds be disbursed in the discretion of the trustee for the benefit of each child in an amount in the discretion of the trustee for the general welfare of said children and for payment of any debts owed by the decedent as a result of her death: a. Pension benefits payable to Gina Diaz (sister); b. Supplemental Life Insurance Policy with Symetra Life Insurance Company payable to Gina Diaz c. Basic Life Insurance Policy with Symetra Life Insurance Company payable to Isabel Diaz-Casillas  The funds referenced above are to be deposited in the trust account of Quinlan, Kershaw & Fanucchi, LLP, and funds are to be disbursed upon the authority of the trustee.  <b>Distribution pursuant to "Agreement Re Verbal Testamentary Trust" is to:</b> <b>Isabel Diaz-Casillas, as Testamentary Trustee for Amando Montero: \$53,252.56;</b> <b>Isabel Diaz-Casillas, as Testamentary Trustee for Jessica Montero Hinojosa: \$54,692.82</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>		X	
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 10-20-14
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 11 – Lujan</b>

1. Petitioner states that prior to the decedent's death, the decedent stated that it was her intention that certain assets be held in trust for her two children (who are adults), including:
  - a. Pension benefits payable to Gina Diaz (the decedent's sister) in the net amount of \$8,853.55, after deduction of \$2,770.10 for federal income taxes withheld, and in the net amount of \$2,770.10, after deduction of \$692.52 for federal income taxes withheld;
  - b. Supplemental Life Insurance Policy with Symetra Life Insurance Company payable to Gina Diaz (the decedent's sister) in the amount of \$60,093.70; and
  - c. Basic Life Insurance Policy with Symetra Life Insurance Company payable to Isabel Diaz-Casillas (Petitioner) in the amount of \$75,117.12.

These cash assets were inventoried by the Administrator as assets of the estate on the I&A filed 9-4-13 pursuant to Probate Code §8901; however, these accounts had beneficiary designations.

Petitioner is the designated beneficiary of the Symetra Basic Life Insurance Policy. Is it correct to assume that by this petition, Petitioner consents to the probate of this asset as an asset of the estate?

Gina Diaz, the decedent's other sister, however, is the designated beneficiary of the Symetra Supplemental Life Insurance Policy and the EOC Pension benefits. Gina Diaz has not signed any consent to include these assets as assets of the estate, or to the "Agreement" that would allow these accounts to be probated and distributed ultimately to other beneficiaries.  
Need authority for including the assets that designate Gina Diaz as beneficiary as assets of the estate.

2. Petitioner titles her declaration regarding the decedent's intent as "Agreement Re Verbal Testamentary Trust," and requests distribution pursuant thereto.

However, there is no such thing as a "verbal testamentary trust." A testamentary trust is a trust created by a will. See §17300. The decedent died intestate. Therefore, any distribution of estate assets would be pursuant to intestate succession, or beneficiary designation, pursuant to clarification of #1 above.

Further, the "Agreement" is signed only by Petitioner and although it includes a statement that the decedent verbally stated certain wishes, it does not provide details that would be relevant to the establishment of an oral trust in accordance with Probate Code §15207, and this petition has not been brought under that section. For example, no information is provided regarding the specific circumstances of how or when the decedent verbally made these statements, which appear to be very specific, yet contrary to the beneficiary designations that were previously in existence.

If Petitioner is alleging that an oral trust was created by the decedent prior to her death, it would need to be separately established under proper authority by clear and convincing evidence, and then Petitioner could theoretically request distribution of the estate pursuant to such previously established trust.

Alternatively, if the beneficiaries (Isabel Diaz-Casillas and Gina Diaz) and intestate heirs (Armando Montero and Jessica Montero Hinojosa) wish to make an agreement regarding the inclusion of certain assets in this probate estate and distribution pursuant to such agreement, an amended petition may be appropriate; however, whatever form such agreement takes, it would not be considered a "verbal testamentary trust."

SEE ADDITIONAL PAGES

3. Bank of America filed a creditor's claim \$32,911.04, which was rejected per Rejection filed 9-23-13. However, Petitioner does not state whether any lawsuit resulted from the claim/rejection pursuant to Cal. Rules of Court 7.403.

In the petition, Petitioner states that this claim was for a second deed of trust on real property "which was lost to foreclosure." However, the petition does not state when the property was lost to foreclosure. Was it was prior to or after the decedent's death in January 2013? In the "Agreement" signed by Petitioner in June 2013, Petitioner states the residence "is currently in proceedings for a Trustee's sale," which indicates that the real property was not yet foreclosed, and was owned by the decedent at her death and therefore should have been inventoried as an asset on the I&A.

Need verified statement regarding whether any action was taken by the creditor upon rejection of the claim, and clarification re the real property. If the property was not foreclosed, what actions were taken, if any, with regard to the property?

4. Petitioner did not answer #5 on the I&A re Property Tax Certificate. Need verified statement regarding the requirements of R&T Code §480.
5. The disbursements schedule indicates that Petitioner made numerous "advances" to the decedent's two children as trustee of the "trust" without Court authorization in violation of Probate Code §11620. Jessica Hinojosa has received \$10,559.74 and Armando Montero has received \$10,000.00, plus \$2,116.68 for funeral expenses (not itemized) plus \$2,000.00 paid to McCormick Barstow on Armando Montero's behalf (without explanation).
6. Petitioner does not address whether notice was required to the Director of the California Victim Compensation and Government Claims Board pursuant to Probate Code §9202(b).

Note: Based on the above issues, the Court may strike any language approving the acts and transactions of the personal representative.

7. Petitioner requests to retain a reserve amount of \$5,000.00 for closing expenses; however, Petitioner does not indicate what liabilities may be determined to be due. It appears from the disbursements schedule that the decedent's final taxes have been completed. The Court may require clarification regarding the purpose of the reserve, and, consistent with the Court's recent practice, if Court determines an informal accounting of the closing reserve is warranted, Court will set a Status Hearing as follows:

- Thursday, February 26, 2015 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$5,000.00 Closing Reserve.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. Filing of the informal accounting of closing reserve will not generate a new hearing date.

Atty Bagdasarian, Gary G. (for Irene Barajas – Petitioner – Daughter)

Atty Kharazi, H. Ty (for Yesenia Torres Fajardo – Competing Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 06/03/2014</b>		<b>IRENE BARAJAS</b> , daughter is petitioner and requests appointment as Administrator without bond.  Limited IAEA – o.k.  Decedent died intestate  Residence: Mendota Publication: The Firebaugh-Mendota Times  <u><b>Estimated value of the Estate:</b></u> Personal property - \$100.00 Real property - \$100,000.00 <b>Total - \$100,100.00</b>  Probate Referee: Steven Diebert	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>12B is the competing Petition filed by Yesenia Torres Fajardo, surviving spouse.</b>  <u><b>Note:</b> If the petition is granted status hearings will be set as follows:</u>  • <b>Thursday, 02/26/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Thursday, 01/21/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<b>Cont. from 093014</b>			
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<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 10/22/2014
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 12A - Gutierrez</b>

12A

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 06/03/2014</b>  <b>Cont. from</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;"></td> <td style="width: 85%;"><b>Aff.Sub.Wit.</b></td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td><b>Verified</b></td> <td></td> </tr> <tr> <td></td> <td><b>Inventory</b></td> <td></td> </tr> <tr> <td></td> <td><b>PTC</b></td> <td></td> </tr> <tr> <td></td> <td><b>Not.Cred.</b></td> <td></td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td><b>Notice of Hrg</b></td> <td></td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td><b>Aff.Mail</b></td> <td style="text-align: center;">w/o</td> </tr> <tr> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td><b>Aff.Pub.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Sp.Ntc.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Pers.Serv.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Conf. 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Posting</b>			<b>Status Rpt</b>			<b>UCCJEA</b>			<b>Citation</b>			<b>FTB Notice</b>		<p><b>YESENIA TORRES FAJARDO</b>, surviving spouse is petitioner and requests appointment as Administrator without bond.</p> <p>Limited Authority – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Mendota Publication: The Business Journal</p> <p><b><u>Estimated value of the Estate:</u></b> Real property - \$100,000.00</p> <p>Probate Referee: Steven Diebert</p> <p>Petitioner states the sole asset of the estate is the real property located in Mendota, California. If Petitioner is appointed Administrator of the estate, and if said property is to be sold during the administration, Petitioner will be required to petition this Court for confirmation of such sale because Petitioner is only requesting limited authority under the Independent Administration of Estates Act. Petitioner consents to an order placing all net sales proceeds into a blocked bank account at Bank of America, such account to be set up at a later time, with withdrawals from such account to be made only upon the order of this Court. Therefore the petitioner requests that no bond be required of her as Administrator.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Confidential Supplement to Duties &amp; Liabilities of Personal Representative, Mandatory Judicial Council Form DE-147S.</li> <li>2. Petition indicates decedent's residence at the time of death was Mendota, California, therefore the correct publication should be The Firebaugh-Mendota Times. Petitioner published in The Business Journal.</li> </ol> <p><b><u>Declaration of Substantial Compliance filed 09/22/2014</u></b> states although the decedent resided in the city of Mendota, California at the time of his death, Declarant published the Notice of Petition to Administer Estate in the Business Journal rather than the Firebaugh-Mendota Times, under the theory that more potential creditors of the decedent would be likely to see the notice of death if it were to be published in a newspaper of as wide a circulation. Declaration hereby states that the publication here in the Business Journal constituted substantial compliance with the publication requirements set forth in the California Probate Code.</p> <ol style="list-style-type: none"> <li>3. Need Order.</li> <li>4. Need Letters.</li> </ol> <p style="text-align: center;"><b><u>Please see additional page for Status Hearings.</u></b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><b>Reviewed by:</b> LV</td> </tr> <tr> <td><b>Reviewed on:</b> 10/22/2014</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File 12B – Gutierrez</b></td> </tr> </table>	<b>Reviewed by:</b> LV	<b>Reviewed on:</b> 10/22/2014	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 12B – Gutierrez</b>
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**Note: If the petition is granted status hearings will be set as follows:**

- **Thursday, 02/26/2015 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal **and**
- **Thursday, 01/21/2016 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA with Limited Authority (Prob. C. 8002, 10450)**

<b>DOD: 1/15/14</b>		<p><b>DEBRA ANN WINTERS</b>, named alternate executor without bond, is petitioner.</p> <p>Limited IAEA – o.k.</p> <p>Will dated: 1/31/2006</p> <p>Residence: Clovis Publication: Fresno Business Journal</p> <p><b>Petitioner states</b> there are currently no assets in the estate. Filed concurrently with this petition is a Petition to Quiet Title and Transfer Personal Property to Estate. Petitioner believes that all her father's real property and financial accounts should be included in his estate. However, all of their father's assets are currently held in the name of Christy L. Pedron because her father added her as a joint tenant to the title of the real property and financial accounts.</p> <p><b>Probate Referee: Rick Smith</b></p> <p>Please see additional page for Contest to Petition for Probate of Will.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note: Petitioner is a resident of Colorado.</b></p>	
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			<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 10/22/14</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 13A – Martinson</b></p>	

**Contest of Petition for Probate of Will filed on 10/17/14 by Christy Lynn Pedron.** Contestant states the decedent was not married at the time of his death. He was survived by three children, the Contestant, Petitioner and a son named Ronald Paul Martinson. Contestant states that as indicated by the Petitioner's own petition, there is no property requiring administration. Contestant alleges that all the property of the decedent at the time of his death was held in a manner that passed to his successor in interest by operation of law, or was of a value that does not require administration under the provisions of the Probate Code. Petitioner also filed with the Court in conjunction with her brother, Ronald, a Quiet Title Action. Petitioner alleges that there is property that belongs to the decedent's estate in possession of Contestant. The Petitioner has raised a trier of fact issue that can be adjudicated without a personal representative being appointed. Further, if it is determined that Contestant is in possession of property requiring administration, a Petition for Probate of Will would only then be appropriate.

Contestant objects to the appointment of Petitioner as Executor of the Will because the Contestant was named in the Will as the first alternate and therefore has higher priority to be appointed Executor. Contestant has not and has never intended to renounce her right to appointment as executor. There exists good cause for Contestant's failure to file a petition for Probate of Will. Simply put, there are no assets to probate. If and when it is discovered there are assets to probate, the Contestant intends to file a Petition for Probate of Will and for Letters Testamentary. In the meantime, it is not in the best interest of the decedent's estate or the persons interested therein for the Contestant to incur the expense of another filing fee and another publication fee only to oppose a Petition of the Petitioner with an unnecessary Petition of her own.

**Wherefore, Contestant prays for an Order of this Court as follows:**

1. The Petition of Debra Ann Winters for Probate of Will and for Letters Testamentary be denied;
2. Petitioner not be appointed as personal representative of the decedent's estate;
3. Contestant's right to seek appointment as Executor of the Will be preserved if assets are hereinafter discovered requiring administration.



(1) Petition to Quiet Title and Require Conveyance of Real Property and (2) to Determine Title and Transfer Personal Property to Estate

<b>DOD: 1/15/14</b>		<b>RONALD PAUL MARTINSON and DEBRA ANN WINTERS</b> , are petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioners state <b>Ronald M. Martinson ("Mr. Martinson")</b> executed his will on 1/31/2006.	
<b>Cont. from</b>		Decedent named his wife, <b>LaVerne A. Martinson</b> as initial beneficiary. Decedent's three children <b>Ronald Paul Martinson ("Ronnie")</b> , <b>Debra Ann Winter ("Debra")</b> and <b>Christy Lynn Pedron ("Christy")</b> were named as alternates.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	LaVerne A. Martinson died on 1/23/2006. Upon LaVerne's death Mr. Martinson succeeded to LaVerne's interest in the home they owned together. Mr. Martinson also had investments ("accounts") from his mother-in-law, which are estimated to have been worth between \$90,000 and \$160,000 in 2006.	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Petitioners allege that after LaVerne died Mr. Martinson's physical and mental health began to rapidly decline. On more than one occasion, Mr. Martinson got lost while venturing out on his scooter, such, Christy's husband Paul Pedron ("Paul") had to retrieve Mr. Martinson and bring him home.	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Mr. Martinson also underwent heart surgery and multiple hip surgeries, among other procedures. On at least one occasion following one of the surgeries, Mr. Martinson's son Ronnie visited but Mr. Martinson was unable to recognize or recollect his son.	
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		<b>Please see additional page.</b>	<b>Reviewed by: KT</b> <b>Reviewed on: 10/22/14</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 13B – Martinson</b>

Mr. Martinson continued to reside in his residence. Christy lived nearby and due to her close proximity, she and her husband Paul were able to assist Mr. Martinson with his personal and financial needs, as his ability to take care of himself declined.

Petitioners allege Christy and Paul developed a confidential relationship with Mr. Martinson such that he reposed trust and confidence in them up until the time of his death. Though Ronnie and his family lived across country, they maintained regular communication with Mr. Martinson, via telephone, email, chat room and periodic, in person visits.

On 12/9/2009 Mr. Martinson, executed a quitclaim deed on the residence to himself and his daughter Christy as joint tenants with right of survivorship. Petitioners believe around that time Mr. Martinson also added Christy on title to his accounts.

Later that month Debra learned of the deed and the re-titled accounts. On 12/28/2006, Debra called and spoke with her father. During that conversation, the subject of the deed and re-titled accounts came up. Mr. Martinson explained to Debra that he signed the deed in order to make the transfer of his home easier upon his death, and that he had not changed his distribution goals as reflected in his 2006 Will. Further, he explained to Debra that Christy was added to his accounts so that she could help him pay his bills, that it was not intended to alter the distribution plan set forth in his Will, and that it was not intended to be a current or future gift to Christy.

In 2011, the fact that Mr. Martinson's accounts had been changed for convenience purposes was confirmed by Ronnie as well. Mr. Martinson underwent another surgery in 2011. Christy called Ronnie and asked him to come help. Ronnie flew out to help Mr. Martinson. However, Mr. Martinson's mental condition had so declined that he was unable to recognize or recall Ronnie as his son. Notwithstanding that fact, Mr. Martinson shared with Ronnie his concern that Christy was not going to allow Mr. Martinson to return to his home after the surgery. Ronnie asked Mr. Martinson about his accounts as he believed there should be more than enough to pay for in home nursing so Mr. Martinson could remain in his home. At that time, Christy's husband Paul explained to Ronnie and Debra (who was also present) that Christy had already been added to Mr. Martinson's accounts, that they had already cancelled multiple automatic monthly charitable transfers from his accounts, and that his accounts were in "good hand."

Mr. Martinson died on 1/15/14. On 2/24/14, Christy (through her attorney) issued a "memorandum" to Debra and Ronnie in which she summarized the administration of Mr. Martinson's estate.

In the memorandum issued by Christy's attorney, he states that since Mr. Martinson's residence and bank accounts were co-titled with Christy, those passed solely to Christy, contrary to the terms of the Will. The only assets affected by the distribution provisions of the Will are the 1998 Honda Odyssey and the personal property items. Additionally the 2/24/14 memorandum stated that when Christy learned she was inheriting essentially the entire estate and that Ronnie and Debra would receive almost nothing, she "elected to increase the distributions to both Ron and Debra. . . to \$10,000 each."

**Please see additional page**

**Based on the forgoing Petitioners allege:**

1. Mr. Martinson was an elder adult, and was in a confidential relationship with Christy at the time she caused him to jointly title the residence with her and add her name to the accounts.
2. Mr. Martinson did not understand the at-death ramifications of jointly titling his residence with Christy or of adding Christy's name to his accounts.
3. Mr. Martinson did not intend for the residence or accounts to become the property of Christy as the surviving joint tenant or the other named holder of the accounts.
4. Mr. Martinson was induced to jointly title the residence with Christy and add her name to his accounts by fraud, undue influence and duress, in that Christy took advantage of the trust and confidence Mr. Martinson reposed in her, and through this advantage she substituted her own will for and supplanted that of Mr. Martinson.
5. Christy actively procured the changed titles on the residence and accounts and that Christy unduly profited from the re-titling of Mr. Martinson's residence and accounts.

Petitioners request that pursuant to Probate Code §850 and §9654 this Court determine that the title to the Residence and to the Accounts or the proceeds therefrom be vested in Petitioner, Debra as executor of Mr. Martinson's estate. Petitioners further request that the Court exercise its equitable powers to hold that Christy is a constructive trustee and holds the proceeds of such accounts in trust for the estate of Mr. Martinson.

**Petitioner's pray for an Order:**

1. Determining that the residence and the accounts belong to the estate of Ronald M. Martinson.
2. That title to the residence and the accounts are rightfully in Petitioner, Debra Ann Winters, as Executor of the Estate of Mr. Martinson;
3. That Christy L. Pedron is directed to convey title on the residence and the accounts to Debra Ann Winters, as executor;
4. That Christy L. Pedron is directed to render an accounting for the accounts from the time she was added to the title of the accounts;
5. For costs of suit herein.

**Please see additional page**

**Response to Petition filed on 10/21/14 states** she denies that Mr. Martinson "physical and mental health began to rapidly decline" after LaVerne's death. To the contrary, Mr. Martinson's physical and mental health remained relatively stable for his age and he lived in his own home without supervision until his death. Mr. Martinson did undergo certain medical procedures and surgeries related to his heart and femur in 2011. After the procedures, Mr. Martinson was moved into a residential rehabilitation facility and as a result was later discharged back to his home. The residential rehabilitation facility employees and social workers met with and evaluated Mr. Martinson's physical and mental health prior to his discharge from the facility in 2011. Christy believes that the facility and social workers would not have permitted Mr. Martinson to return home without supervision unless he was able to successfully demonstrate his physical and mental ability to live independently.

Christy admits that on one occasion following surgery, Mr. Martinson did not recognize Ronnie. However, Christy believed that Mr. Martinson failed to initially recognize Ronnie due to the length of time it had been since Mr. Martinson had last saw Ronnie. Mr. Martinson quickly thereafter did recognize Ronnie and even commented that to Ronnie and Debra that they only came to visit him because they thought he was going to die, or as Mr. Martinson put it, "bite the weenie." Debra and Ronnie rarely visited Mr. Martinson and typically only visited when there was a death in the family.

Christy denies that she managed or assisted in any of Mr. Martinson's personal or financial needs. To the contrary, Mr. Martinson managed his own finances until his death, including his online banking and payment of his bills. The only exception, Christy paid Mr. Martinson's bills for the period of time that he was living in the residential rehabilitation facility. Once Mr. Martinson was released from the rehabilitation facility he resumed the management of his finances.

Christy alleges that Mr. Martinson was displeased with Debra and Ronnie and did not have a good relationship with either of them leading up to his death. After executing the quitclaim deed, Mr. Martinson told Christy and her husband what he had done and told Christy that he wanted to give her the residence. Furthermore, after Mr. Martinson added Christy to as co-owner on his financial accounts, he again told her he wanted her to have all of the remaining funds contained in those accounts upon his death.

Petitioners cannot present any evidence that Mr. Martinson was lacking in capacity in 2009 when the transfer(s) occurred. Regardless of any alleged conversations Petitioner claims to have had with Mr. Martinson in 2009, Decedent's act of transferring the residence and accounts into joint tenancy with rights of survivorship dictates the ownership of those items upon his death.

**Please see additional page**

**Response of Christy Pedron continued:**

**Respondent Christy Pedron makes the following Affirmative Defenses:**

1. Each and every claim alleged in the Petition fails to state facts sufficient to constitute a cause of action against Respondent.
2. All claims set forth in the Petition are barred by the applicable statute of limitations, including, but not limited to, CCP §318, 319 and 338.
3. Petitioners are barred from maintaining the alleged claims by the doctrine of laches.
4. Petitioners have waived the purported claims and relief requested in the Petition.
5. By reason of knowledge, statements, and conduct of the Petitioners and that of their agents, Petitioners are barred by the doctrine of estoppel from any recovery.
6. Any alleged acts or omissions of Respondent, if any, which alleged acts or omissions are generally and specifically denied herein, were not the legal and/or proximate cause of any loss alleged or sustained by Petitioners, which loss is also generally denied by Respondent.
7. Petitioners have acted with unclean hands, which conduct has prejudiced Respondent and bars any recovery.
8. Respondent has acted reasonably, properly and in good faith in all transactions relevant hereto, and did not directly or indirectly perform any acts whatsoever which would constitute a breach of duty, if any, owed to either Mr. Martinson or to Petitioners, the existence of any such duty is expressly denied by Respondent.
9. Petitioners lack standing to assert the claims alleged in the Petition.

**Respondent prays for an Order of this Court:**

- A. That Petitioners take nothing by way of their Petition;
- B. For an award of attorney's fees and costs of suit herein to Respondent.

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 05/25/2014</b>		<b>BRIAN J. GRIFFIN</b> , nephew/named executor without bond, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Full IAEA – o.k.	1. #5a(3) or #5a(4) was not answered regarding a registered domestic partner.  2. #5a(7) or #5a(8) was not answered regarding issue of predeceased child.
		Will dated: 04/05/2013	
<b>Cont. from</b>		Residence: Fresno	<b>Note: If the petition is granted status hearings will be set as follows:</b>  • <b>Thursday, 02/26/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Thursday, 01/21/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	s/p	
<input checked="" type="checkbox"/>	<b>Verified</b>		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		<b>Estimated value of the Estate:</b> Personal property - \$10,600.00 Real property - \$110,000.00 Less encumbrances -\$40,000.00 <b>Total - \$80,600.00</b>
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		<b>Probate Referee: Rick Smith</b>
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 10/22/2014
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 14 – Griffin</b>

Petition for Probate of Will and for Letters Testamentary; Authorization to  
 Administer Under IAEA (Prob. C. 8002, 10450)

<b>DOD: 07/07/2014</b>		<b>GRACIELA SALAS TAPIA</b> , friend/named executor without bond, is petitioner.  Full IAEA – o.k.  Will dated: 04/27/2010  Residence: Fresno Publication: The Business Journal  <b>Estimated value of the Estate:</b> Personal property - \$200,200.00 Real property - \$146,000.00 Less encumbrances - \$10,000.00 <b>Total - \$156,000.00</b>  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note: If the petition is granted status hearings will be set as follows:</b>  • <b>Thursday, 02/26/2015 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u>  • <b>Thursday, 01/21/2016 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			s/p
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w/
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
			<b>Reviewed by:</b> LV	
			<b>Reviewed on:</b> 10/22/2014	
			<b>Updates:</b>	
			<b>Recommendation:</b> Submitted	
			<b>File 15 – De La Torre</b>	

			<b>TEMP GRANTED EX PARTE EXPIRES 10-23-14</b>	<b>NEEDS/PROBLEMS/ COMMENTS:</b>  <u><b>Court Investigator advised rights on 10-16-14</b></u>
			<b>GENERAL HEARING 11-20-14</b>	
			<b>SHEILA VAN DER SMISSEN</b> , Spouse, is Petitioner and requests appointment as Temporary Conservator of the Person.	
			<b>Petitioner states</b> she and James have been married for over nine years. James has two children from a previous marriage: Aran Linn Ransom and Megan Ransom. Aran has an extensive history of alcoholism and has had his license taken away, as well as criminal history and history of drug abuse. After an incident in 2010, James went into a program and since then has rarely drank alcohol. They did not have contact with Aran from 2010 to 2013 until Aran called for James' 70 <sup>th</sup> birthday, and since then, they have had some communication.	
			In 2008, Petitioner and James went to an estate-planning attorney and had a trust, wills, durable power of attorney and advance health care directive drafted. Their assets are in trust and Petitioner and James are the trustees. There is no need for conservatorship of the estate because all assets are in trust.	
			Petitioner states James was diagnosed with dementia in 2013, and is now diagnosed with Alzheimer's. Aran is currently unemployed and residing in a garage in Madera with his wife Debbie. Petitioner felt that James would be a positive influence in Aran's life, and would program Aran's address into James' GPS so that he could visit him.	
			James went to Aran's in Madera on 10-2-14. The next day, he did not answer his phone, but later received a text message that he was all right. Petitioner went to the Madera police station and went with officers to Aran's to check on James. The officers told Petitioner that they could not help her without a court order. That night, Petitioner saw that there were several charges on the credit cards and funds taken from the ATM. The next day, she learned that \$5,000.00 had been taken from the savings account, and an additional \$1,400.00 was taken on 10-7-14.	
			<b>SEE ADDITIONAL PAGES</b>	
				<b>Reviewed by:</b> skc
				<b>Reviewed on:</b> 10-22-14
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 16 – Ransom</b>



## Page 2

Petitioner states the funds were deposited into a new bank account in James' and Debbie's names.

Petitioner states that recently, James called his daughter Megan and started shouting at her. Debbie was heard in the background telling James that he "did a good job."

Petitioner, with the assistance of police, went to see James on Monday 10-6-14 and was only able to talk with him through a security door. He seemed disoriented and confused. Petitioner heard Aran yelling that his dad was getting a divorce and staying there with him.

Petitioner believes Aran is influencing and controlling James and that James does not know what is going on. Petitioner believes Aran does possess firearms and will use the assistance of the police. **James has Alzheimer's and Petitioner believes that Aran and his wife only want James at their place so they can control his finances.** (Emphasis in original.)

**Petitioner requests immediate appointment as temporary conservator of the person of her husband James so that she can go pick him up in Madera. Once Aran does not have control over James, he and Debbie can no longer access the bank accounts. Petitioner plans to bring James' best friend of over 30 years with her to help calm and assure James. He has not taken his medication, and is possibly drinking alcohol. Petitioner is concerned that his health will decline significantly.**

Attached is the Advance Health Care Directive dated 6-27-08 in which Petitioner is designated as agent and nominated as conservator.

Attached is a signed statement dated 1-1-11 and signed by Petitioner, James, and two additional alternate nominees that states that if Jim needs care, the care is not to be provided by Aran, and under no circumstances should Aran benefit financially or otherwise from Petitioner's and James' financial savings and planning.

Attached is a statement from Kaiser Permanente.

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**On 10-17-14, Aran Ransom, Son, filed an Objection. Objector states** a petition for dissolution has been filed as 14CEFL05585 by James Ransom on 10-9-14. The Court must find by clear and convincing evidence that appointment of a spouse who is a party to a petition for dissolution of marriage would be in the best interests of the proposed Conservatee. Objector states it is not in the proposed conservatee's best interest.

Objector states the proposed Conservatee has gotten lost several times driving and the petitioner has not taken any steps to keep him from driving. If she was concerned for his welfare, why has she not taken steps to have his license revoked? James' driving puts himself and others in danger.

Objector states Petitioner misleads the Court to believe that he is a drug user, alcoholic, and violent. Objector states the incident in 2010 is exaggerated by Petitioner, and he has been sober for 18 months. He is four months from recovering his license.

Objector states the Petitioner hosts an "African Drum Circle" every month at their residence. People stay all night and bring campers, tents, or sleep on the ground. People bring libations to consume. Petitioner also grows San Pedro cactus and processes it into peyote for these drum circles. James has a medical marijuana card and Sheila also smokes marijuana. If Sheila knows James is taking medication for Alzheimer's and other conditions, encouraging him to partake of peyote, alcohol, and marijuana cannot be helping his memory and other medical problems.

**SEE ADDITIONAL PAGES**

## Page 3

**Objector states** Petitioner leaves James alone at home for several days with a "to do" list including requiring James to use the riding lawn mower, chain saw, weed eater and edger, gathering brush, and burning the brush. In one incident, a fire got out of control. Sheila took James to "Burning Man" this summer and let him wander among the many thousand people at this event. This is the kind of neglect that Objector believes is not in James' best interest.

Objector states he lives in a 2-bedroom home, not a garage as Petitioner states. Petitioner has misinformed the Court about the events leading to the petition. Objector states James told Aran that he was fed up with his marriage, and he filed for divorce on 10-9-14. James states Sheila belittles him and is totally controlling over his life. He is tired of the circumstances and wants to be done with her. He wants to be able to keep his own money and not have to sign everything over to Sheila. James stated this in a video.

The fund described by Sheila as fraudulently taken were withdrawn from the account by James with his consent and direction. He wanted the fund to hire an attorney to file for divorce. He deposited the funds into an account with Debbie so that Sheila would not have access.

Objector provides additional information about various situations that he states are misrepresented to the Court by Sheila, including that she did not take his best friend to calm him down, she brought a woman, Lyn, that James dislikes a great deal. Objector does not believe Sheila is acting in James' best interest.

**Objector prays that the temporary conservatorship petition be denied, that the Public Guardian be appointed as temporary conservator of the person, and that the Court order an independent examination done by a physician outside of the Kaiser Hospital system. A Proposed Order is provided.**

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Court Investigator Julie Negrete filed a report on 10-20-14.

**Petition for Appointment of Temporary guardianship of the Person**

<b>Age: 2</b>		<b><u>GENERAL HEARING 12/15/2014</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>CINDY ROBERTSON</b> , maternal grandmother, is petitioner.		1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Temporary Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Jarrod Ritter (Father)</li> </ul>	
		Father: <b>JARROD RITTER</b> , Objection filed 10/22/2014,			
<b>Cont. from</b>		Mother: <b>BAILEY ROBERTSON, Consent and Waiver of Notice filed 10/16/2014</b>			
	<b>Aff.Sub.Wit.</b>				
✓	<b>Verified</b>				
	<b>Inventory</b>				
	<b>PTC</b>				
	<b>Not.Cred.</b>				
✓	<b>Notice of Hrg</b>				
	<b>Aff.Mail</b>	n/a			
	<b>Aff.Pub.</b>				
	<b>Sp.Ntc.</b>				
	<b>Pers.Serv.</b>	x			
✓	<b>Conf. Screen</b>				
✓	<b>Letters</b>				
✓	<b>Duties/Supp</b>				
	<b>Objections</b>				
	<b>Video Receipt</b>				
	<b>CI Report</b>				
	<b>9202</b>				
✓	<b>Order</b>				
	<b>Aff. Posting</b>				
	<b>Status Rpt</b>				
✓	<b>UCCJEA</b>				
	<b>Citation</b>				
	<b>FTB Notice</b>				
		Paternal Grandfather: Michael Ritter Paternal Grandmother: Crystal Perez  Maternal Grandfather: Bruce Robertson  <b>Petitioner states:</b> the child has lived with the petitioner basically since her birth. During the majority of this time the child and her mother have lived in petitioner's home. The mother is currently in an in-patient facility for drug related issues and left the child in the petitioner's care during her unavailability. The child's father currently resides in the California Hotel in downtown Fresno which is not child friendly. Current Family Law order provides that the father have supervised visits only. The petitioner is an approved supervisor for the father's visitation however he has undertaken actions to the detriment of the child and in violation of the court order including, without limitation, removing her from the home without the supervisor's approval or knowledge, repeatedly calling the police due to alleged "abuse" and "harassment" by the petitioner and informing the police that petitioner does not have custody and is not her parent and he can take the child if he likes as he is her parent. Petitioner states given the father's mental health issues, suicide attempts, his lack of appropriate residence for the child, she is requesting temporary guardianship. <b><u>Please see additional page</u></b>			
				<b>Reviewed by:</b> LV	
				<b>Reviewed on:</b> 10/22/2014	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 17 – Robertson</b>	

**Objection filed by Jarrod Ritter, Father, on 10/22/2014** states he has tried to be a part of the minor's life but has been met with extreme resistance from the minor's mother and her family. He states he took the mother to court after she would not allow him to see the child. They went through mediation and came to an agreement on a graduated plan. Mr. Ritter agreed to have visits with the child at the house that she resided in to allow her to adjust and allow him to graduate from college. Eventually the child would stay with Mr. Ritter part time. He states from the beginning of his visits it became apparent that he was not welcomed by the petitioner. She was extremely hostile toward him and even insulted him in front of the child. Things became worse when the mother was admitted into a mental hospital and then into a rehab program. Mr. Ritter states that the petition for guardianship states he has been in substance abuse programs on four occasions, which is not true. Petitioner also states he is Bi-Polar and uses Methamphetamine, which he states is also untrue. He states that he has spoken to the management at his residence and they have no problem with the child staying with him. He asks that visitation be changed. There is no reason for him to have supervised visits with his daughter. Mr. Ritter states is apparent that the petitioner is not willing to work with him and is treating the custody situation like a battle when he is more than willing to work with them. Objector recommends that the Court to order that all parties involved with the care of the minor attend counseling so that the minor can get the best care.

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>DOD: 08/17/12</b>		<b>EDWARD SIMPSON</b> , brother, was appointed Administrator with limited IAEA, without bond, with deposits of \$1,000,000.00 to be placed into a blocked account on 10/16/13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Letters of Administration were issued on 10/22/13.	<p><b>Note: Status Hearing regarding the filing of the Receipt for Blocked Account and Status Hearing for the filing of the Inventory and Appraisal are set for 11/10/2014.</b></p>
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Minute order dated 8/20/13 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.	<p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
<input type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 10/22/2014
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 18 – Simpson</b>

DOD: 01/09/98		<b>RALPH EAVES</b> , son, is Petitioner.  40 days since DOD.  No other proceedings.  I & A                -                \$65,000.00  Decedent will dated 11/15/73 (See notes)  Petitioner requests Court determination that decedent's interest in real property located on Lafayette Avenue in Fresno, CA pass to him pursuant to decedent's will? (see notes)	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>CONTINUED FROM 09/18/14</u> Minute Order from 09/18/14 states: Mr. Eaves is sworn and testifies that the signature on the will of Ruby Eaves is the original signature of Ruby Eaves. Mr. Eaves represented to the Court that Rita Cornelison has been noticed. Revised Order needed to resolve the issues with the property on order and property in the Inventory & Appraisal are the same.  <b>As of 10/22/14, nothing further has been filed.</b> 1. The will is not self-proving, need affidavit of subscribing witness. 2. The Inventory & Appraisal does not include the legal description of the real property to be passed. The Order lists a legal description for the property requesting to be passed, but no other identifying information, therefore, there is no way to tell that the property in the Inventory & Appraisal is the same as the property referenced on the Order.
Cont. from 072414, 091814			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
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<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 10/22/14

Updates:

Recommendation:

File 19 – Eaves

Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

<b>Age: 33</b>		<b><u>NO TEMPORARY REQUESTED</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<p><b>PAULETTE EASON</b>, mother, is Petitioner and requests appointment as Conservator of the Person.</p> <p><b>Petitioner states</b> that the proposed conservatee is unable to provide for his personal needs due to mental health issues.</p> <p><b>Court Investigator Dina Calvillo filed a report on 09/25/14.</b></p>			
<b>Cont. from</b>					
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Verified</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Inventory</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>PTC</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Not.Cred.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Mail</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Conf. Screen</b>	<input type="checkbox"/>			
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<input type="checkbox"/>	<b>Duties/Supp</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>CI Report</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Order</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>UCCJEA</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>			
				<b>Reviewed by:</b> JF	
				<b>Reviewed on:</b> 10/22/14	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 20 – Shillings</b>	

Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 05/10/08</b>		<b>HAZEL OLSEN LARSEN and CURTIS WILHITE</b> , daughter and son, are Petitioners.  40 days since DOD  I & A - NEED  Will dated 10/06/2000  Petitioner's request Court determination that decedent's ???% interest in real property located at ???, pass to them pursuant to decedent's will.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Need amended Petition based on but not limited to the following:</b>  1. Need Inventory & Appraisal completed by a Probate Referee. The Inventory & Appraisal filed with the petition is incomplete (it is not filled out at all). <b>Note:</b> an appraisal by a private appraiser is attached, however the property must be appraised by a Probate Referee as of the date of death. 2. The Petition indicates that the decedent had a predeceased spouse. Need name and date of death of predeceased spouse (should be listed at item 14 of the Petition). 3. The petition is missing attachment 11 which is to state the legal description and APN of the property seeking to be passed with this petition. Attachment 11 should also include decedent's interest in the property (50%, 100%, etc.). 4. The petition is marked at item 1 that petitioners are requesting real and personal property pass to them, however there is no indication what the personal property consists of. All property seeking to be passed with this petition must be listed on attachment 11 and the Inventory & Appraisal. 5. Need <i>Notice of Hearing</i> and proof of service by mail at least 15 days before the hearing of all interested parties.	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			x
<input type="checkbox"/>	<b>Aff.Mail</b>			x
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by:</b> JF				
<b>Reviewed on:</b> 10/22/14				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 21 – Meeks</b>				



Atty Greenwood, Anthony Dean (pro per Petitioner)

Atty Greenwood, Kimberli E. (pro per Petitioner)

## Petition to Establish Fact of Marriage

		<b>ANTHONY GREENWOOD and KIMBERLI GREENWOOD</b> , are petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioners request the Court establish fact, date and place of their marriage as follows: July 15, 1989 In Los Angeles County California.	
<b>Cont. from 100914</b>		Petitioners state a certified copy of the official record cannot be found after a search done through the Los Angeles County Recorder's Office.	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	<b>Verified</b> Declaration of Shirley Simmons-Keith states that she was a witness to the exchange of vows between then Kimberli Bell and Anthony Greenwood. She signed the marriage license and served as the Maid of Honor at their wedding on July 15, 1989.	
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	<b>Petitioners request</b> the Court establish the fact of marriage of Anthony Greenwood and Kimberli Greenwood on July 15, 1989 in Los Angeles County, California.	
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	<b>Update: Declaration filed 10-20-14 states</b> that a marriage license <b>was obtained</b> in July 1989 through Norwalk County Recorder's Office, but their personal copy is lost. After unsuccessful attempts to regain a copy from Vital Records in Sacramento and Los Angeles Counties for a year, they were given replies of "no record on file" in either office. The Sacramento office explained that records from 1988 to 2005 were found to be difficult to obtain, and they were instructed to file this petition.	
<input type="checkbox"/>	<b>Aff.Mail</b> N/A		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by:</b> KT	
		<b>Reviewed on:</b> 10/21/14 (skc)	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 22 - Greenwood</b>	

			<b>TEMP GRANTED EX PARTE EXPIRES 10-23-14</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>GENERAL HEARING 11-20-14</b>	
			<b>KATHRYN PADGETT</b> , Spouse, is Petitioner and requests appointment as Temporary Conservator of the Person and Estate with bond of \$109,046.00.	<b>Court Investigator advised rights 10-15-14</b>
			Estimated value of estate:	<b>Note:</b> Temporary Letters were issued on 10-17-14 <u>without bond</u> , to expire 10-23-14.
	<b>Aff.Sub.Wit.</b>		Personal property: \$46,500.00	<ol style="list-style-type: none"> <li>1. Need proof of personal service of Notice of Hearing at least five court days prior to the hearing on the proposed Conservatee. Probate Code §2250(e).</li> <li>2. Petitioner's bond calculation omits the amount for recovery required by Probate Code §2320(c)(4) and Cal. Rules of Court 7.207, even though there is a space for the calculation at #5 of the petition. Examiner calculates that based on the information provided, bond should be fixed at \$119,950.60.</li> </ol>
✓	<b>Verified</b>		Annual income: \$62,546.00	
	<b>Inventory</b>		Total: \$109,046.00	
	<b>PTC</b>		<b>Petitioner states</b> the proposed Conservatee was injured in a motorcycle accident, has subdural hematoma, brain injury, is at a rehab facility, is unable to make medical or financial decisions.	
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>	W		
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>	X		
✓	<b>Conf. Screen</b>			
	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>	X		
✓	<b>Video Receipt</b>			
✓	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
				<b>Reviewed by:</b> skc
				<b>Reviewed on:</b> 10-22-14
				<b>Updates:</b>
				<b>Recommendation:</b>
				<b>File 23 – Padgett</b>